

Figure 1

Figure 2

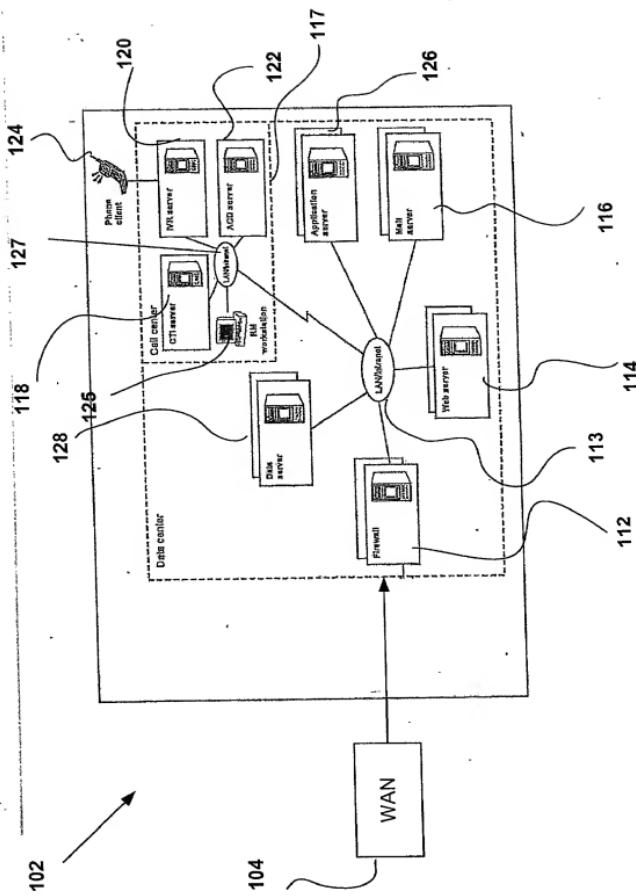
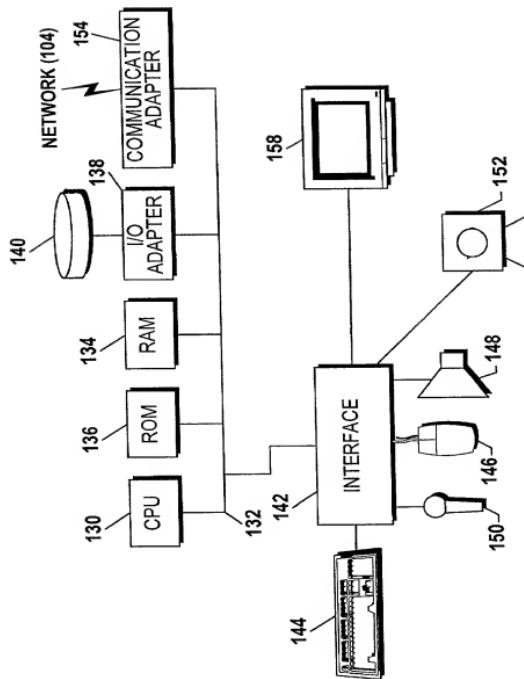


Figure 3



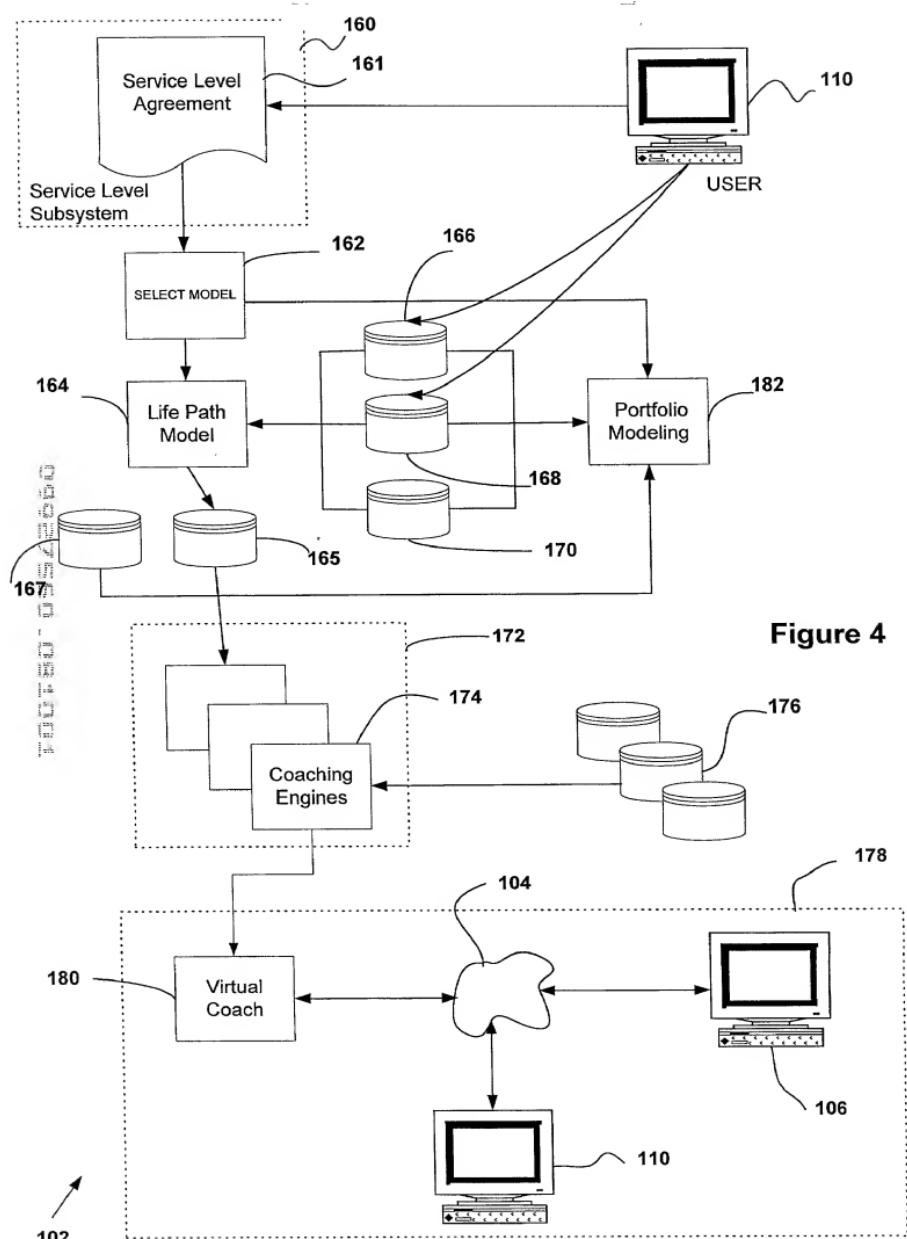
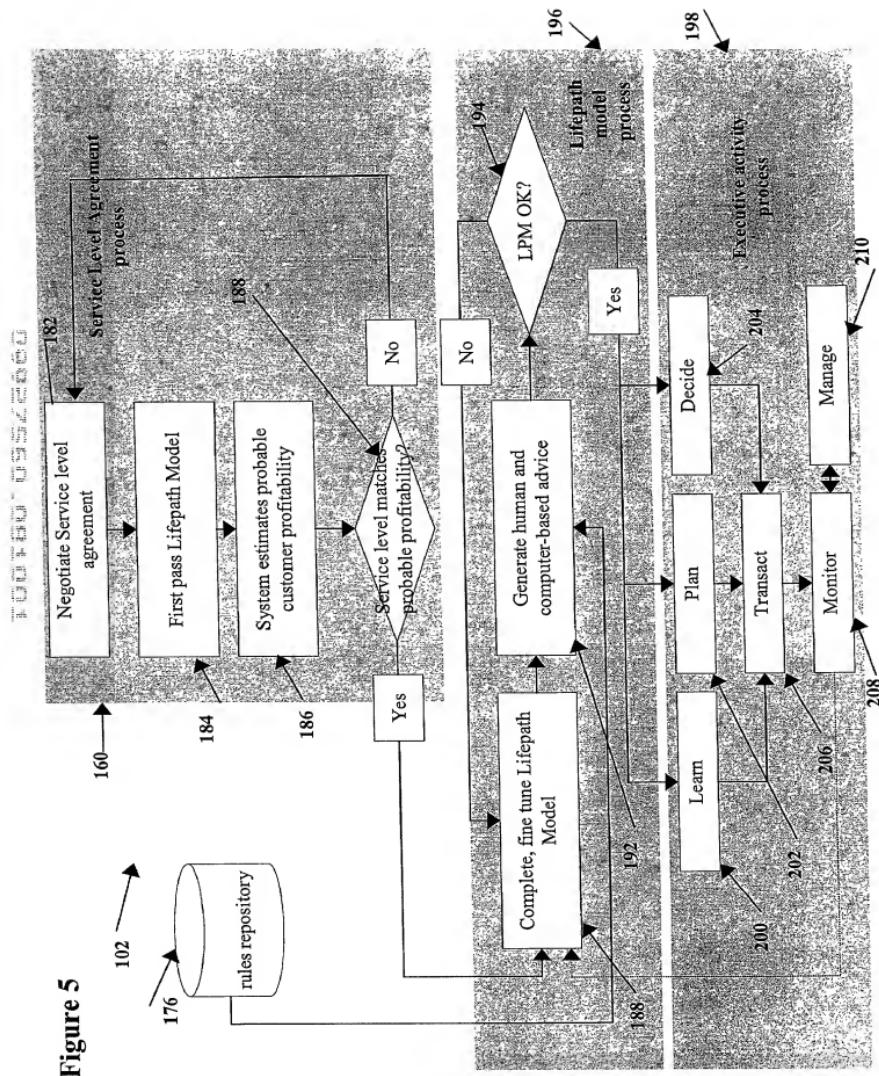
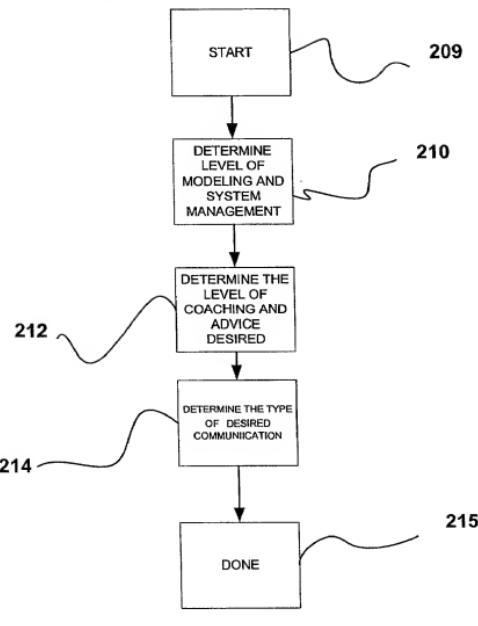


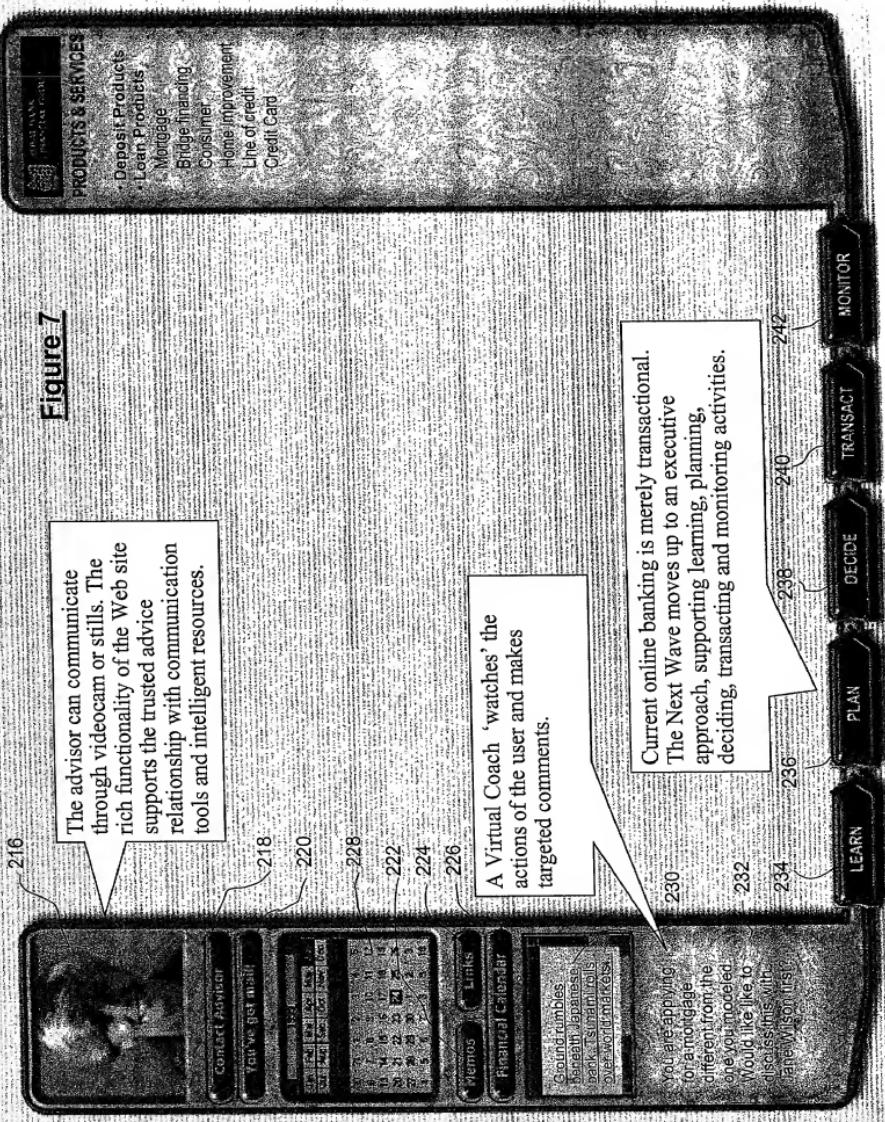
Figure 5





160

FIGURE 6

Figure 7

216 PLAN: LIFE PATH MODEL

Both your home purchase and your children's education are pushing you into the red. Revisit your home purchase plans and consider a tax deferred education savings plan.

PERSONAL RISK MODEL

Include any combination of factors in your risk model.

248 → **JOB LOSS**

244 → **DISABILITY**

250 → **CASUALTY**

252 → **MARKET DOWNTURN**

254 → **DIVORCE**

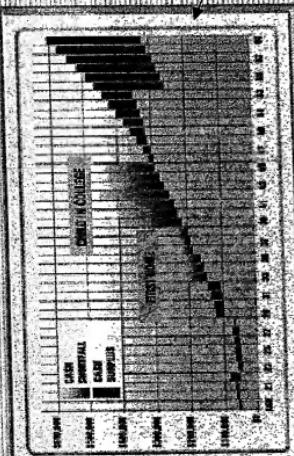
256 → **THEFT**

258 → **FIRE**

260 → **COLLISION**

232 → **RUN THE MODEL**

232 → **LEARN**



246

EXPENSES

Press each button in turn to do a Life Path for all sources of revenue and expense...

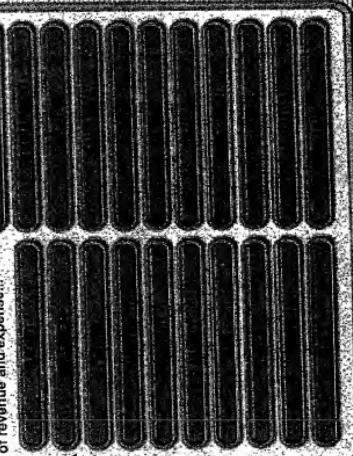


Figure 8

MONITOR

TRANSACT

DECIDE

PLAN

LEARN

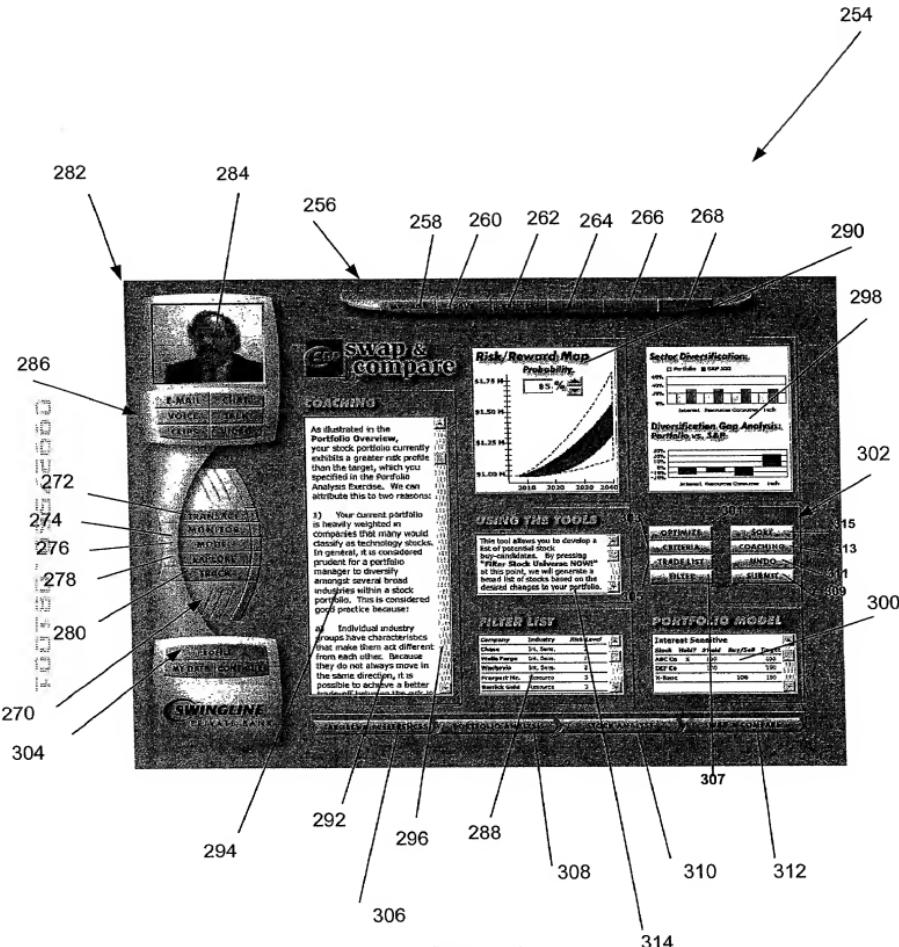
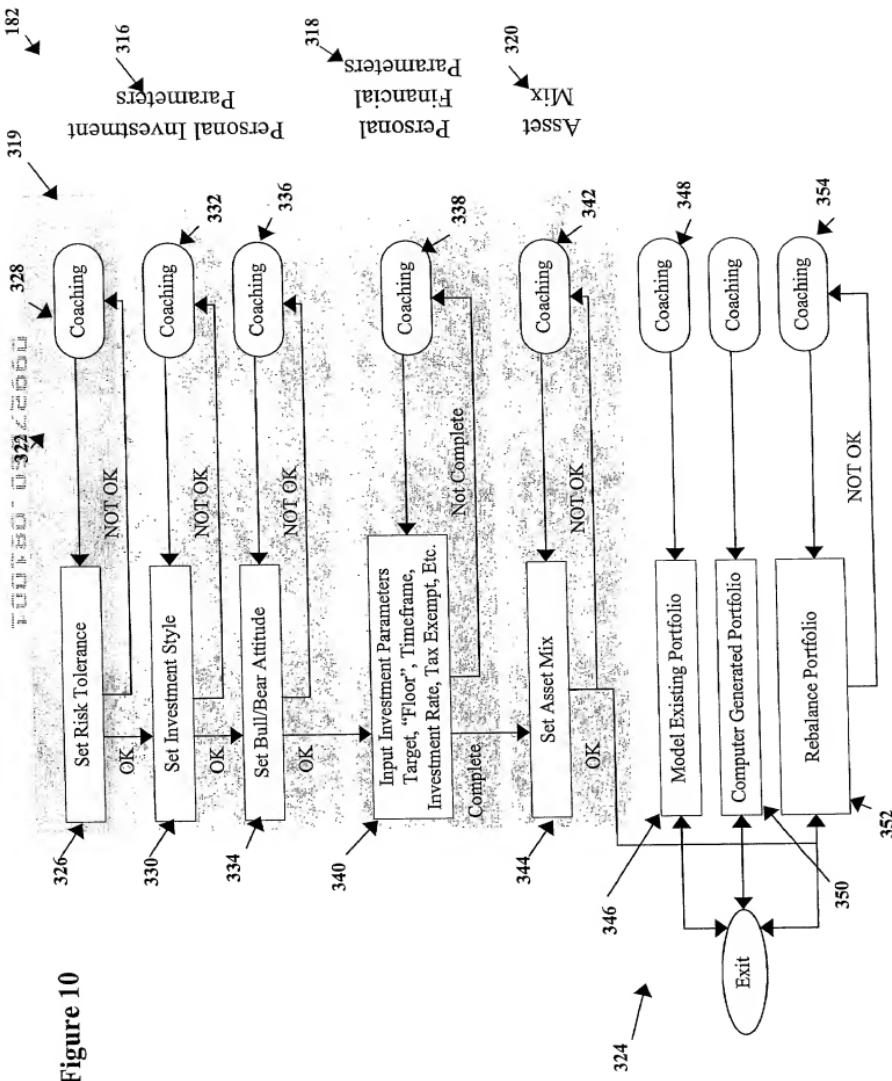
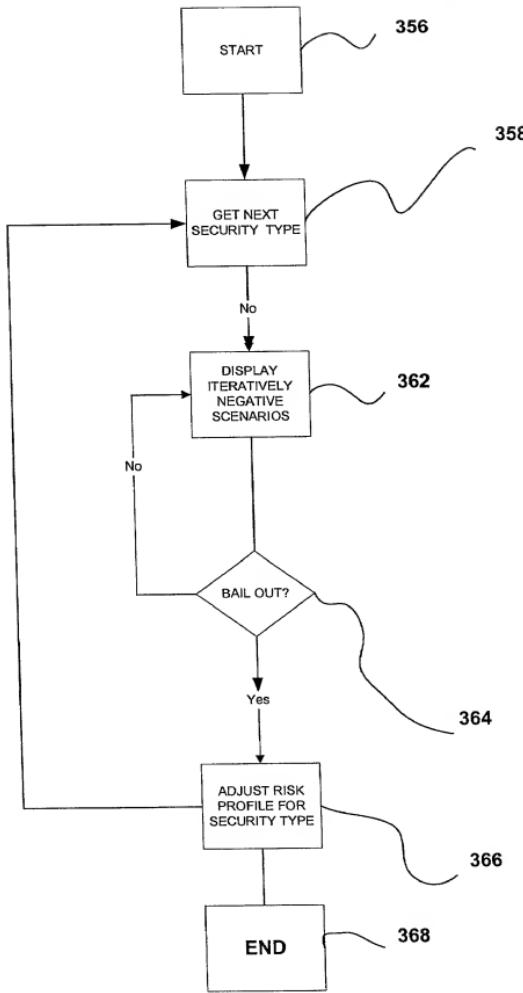


Figure 10





326

FIGURE 11

Figure 12

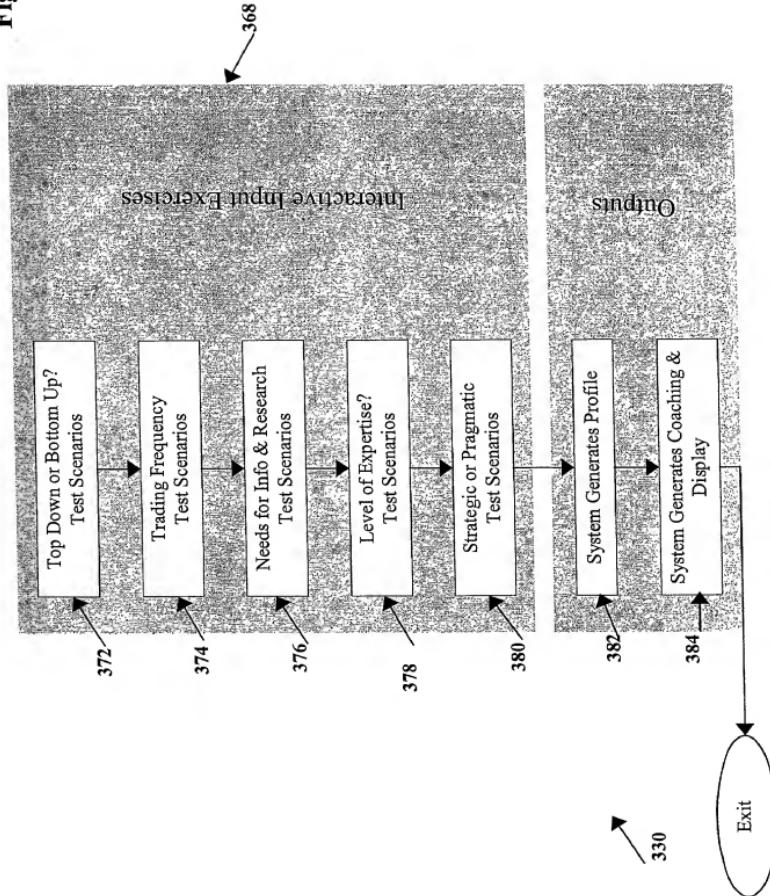
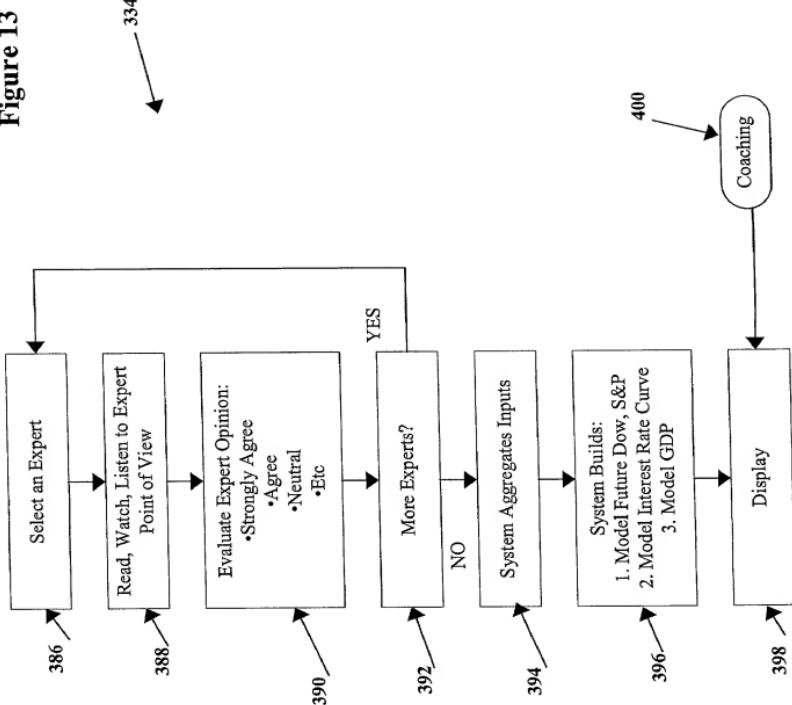
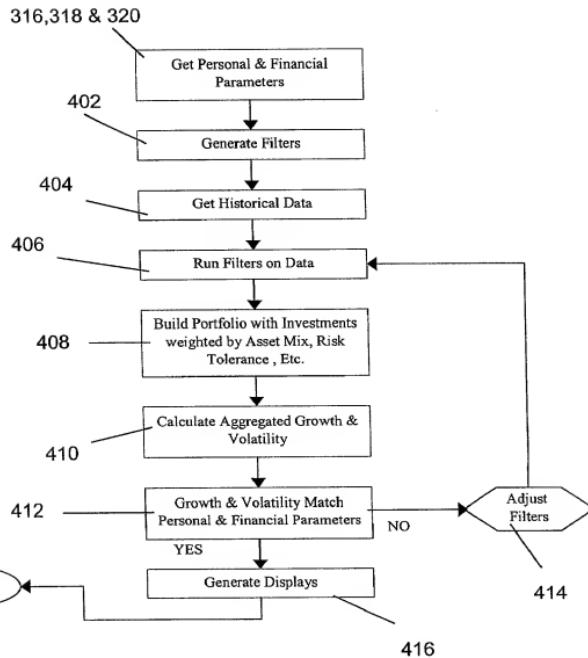


Figure 13



Computer
Generated
Portfolio
(No Coaching)



350

Figure 14

Model Existing
Portfolio

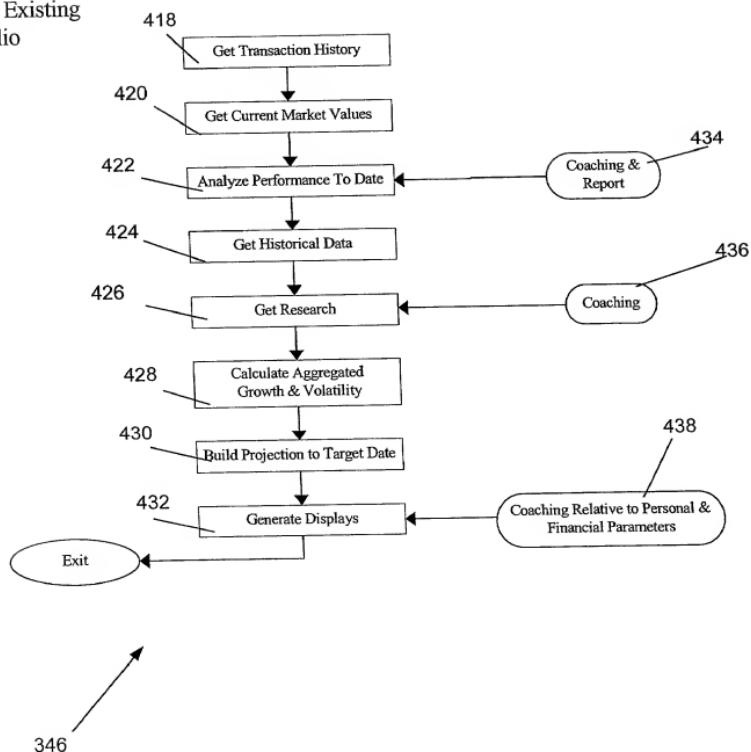
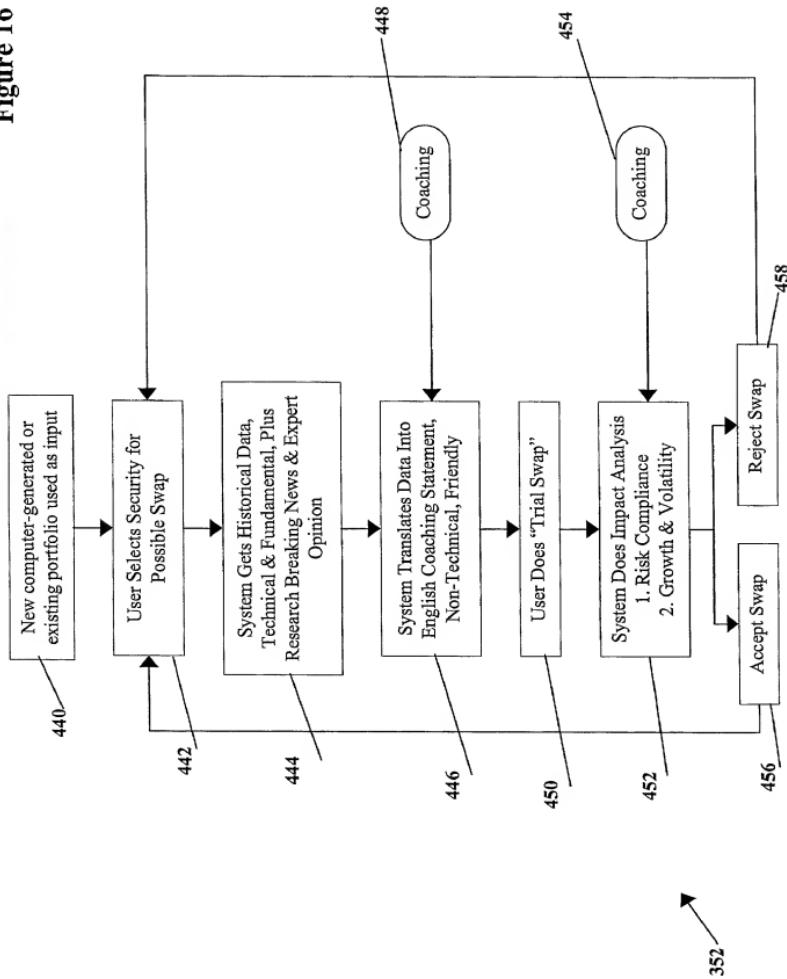


Figure 15

Figure 16

trial swap flowchart



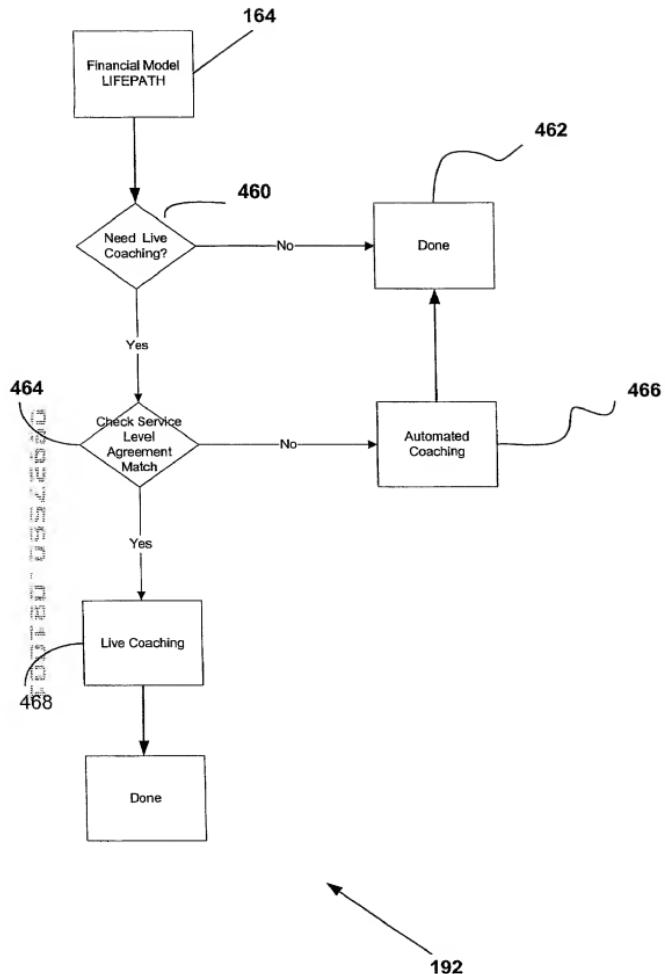


Figure 17